

MORE YEARS

BETTER LIVES

CALL TEXT

Joint Programming Initiative “More Years, Better Lives”
The Potential and Challenges of Demographic Change

Call for research proposals 2016

**Welfare, Wellbeing and Demographic Change:
Understanding Welfare Models**

SUBMISSION DEADLINE: 11 OF APRIL 2016 AT 12:00 (CET)

[Link to electronic proposal submission](#)

JPI MYBL JOINT CALL SECRETARIAT

JCS is hosted by
National Institute of Health Carlos III (ISCIII)
Av. Monforte de Lemos, 5
28029 Madrid – Spain
callmybl@isciii.es

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I. BACKGROUND

The first call of the JPI More Years better Lives was dealing with "extending working life and its interaction with health, wellbeing and beyond". It supported research on the drivers to, and constraints on, extending working life.

The aim of this second call is to support research which will improve our understanding of how different approaches to welfare secure the quality of life, especially for those over 50. This is important, not only because of the ageing of the European population, but also because of increasing pressures on public finances, and changing patterns of population movement and employment, within and beyond Europe itself.

We are seeking to support comparative perspectives on "welfare models", and the ways in which they are changing, drawing on the great diversity of approaches to welfare across Europe and Canada. Welfare models have the function to promote general wellbeing, to help individuals remain active contributing members of the community, and to overcome the challenges of declining health and capability. We are interested in how well different models work, for which groups, in what circumstances, and at what cost for which actors.

Welfare models are deeply embedded in historical, cultural and economic contexts, and there are rarely simple transferable lessons. However, comparative studies can help us to understand the implications, strengths and weaknesses of particular institutional configurations, and how well they meet the needs of particular population groups. A better understanding of these differences can help policymakers identify potential ways of meeting needs, as their own models evolve in response to changing pressures and circumstances. In adopting this comparative perspective, proposals should pay attention to carefully 1) assess of the costs and benefits of different models, 2) identify the roles of the different actors (state, families, local communities, companies, civil society organizations etc.), 3) examine equity and social inclusion inherent in different models, 4) assess the ability and robustness to cope to similar challenges and shocks with a view to learn from each other.

Because welfare models involve a complex interaction of public, corporate and voluntary private activity, understanding them, their impact and the ways in which they are changing, will draw on expertise from many academic disciplines, and research will necessarily need to be interdisciplinary. Issues of wellbeing are often seen in terms of health and material conditions – which are the area of expertise of health scientists, sociologists and economists – and we welcome applications from these fields. However, welfare and wellbeing also raise issues for a wider range of social scientists, and also for the humanities – considering, for example, how individuals understand the meaning and purpose of life, and the ethical implications of particular interventions. We therefore welcome proposals from a wide range of disciplines, particularly on health, social and human sciences. The specific research topics are elaborated further in the text below.

Under the umbrella of the JPI MYBL the 2nd Joint Transnational Call will be launched with funding from the following partner organisations¹:

- Federal Ministry of Science, Research and Economy (BMWFV), Austria
- Research Foundation Flanders (FWO), Belgium (Flanders)
- Canadian Institutes of Health Research (CIHR), Canada
- Academy of Finland (AKA), Finland
- The French National Research Agency (ANR), France
- The Israeli Ministry of Science Technology and Space (MOST), Israel
- Italian Ministry of Health (MoH-IT), Italy
- Ministry for Education, University and Research (MIUR), Italy
- The Research Council of Norway (RCN), Norway
- Foundation for Science and Technology (FCT), Portugal
- Ministry of Economy and Competitiveness (MINECO), Spain
- National Institute of Health Carlos III (ISCIII), Spain
- The Netherlands Organisation for Health Research and Development (ZonMw), The Netherlands

II. RESEARCH TOPICS

Proposals may address one or more of these three research topics:

a. Understanding wellbeing: how appropriate are current measures of wellbeing across the changing life course?

Here we are seeking research which can improve our understanding of wellbeing as it impacts on people across the expanding lifespan.

There is growing agreement among policymakers that the pursuit of individual wellbeing is a legitimate objective of public policy. As a result, many measures of wellbeing have been developed and are in use. However, most of these are based on a notional mid-life individual. We believe that conceptual research is needed into the notions of wellbeing across the life course, and especially what wellbeing means to people in the later stages of life; as well as empirical work to explore how individuals in different circumstances and contexts understand it. This could inform the development of new instruments, which could be incorporated into new as well as existing surveys. Areas where current indicators might be improved include subjective and comparative indicators, issues of meaning and purpose, goals and personality, of trust, social cohesion and isolation, and the interaction of such factors.

From a comparative perspective it is particularly important to understand the extent to which culture, values and social norms affect how people understand wellbeing, as well as how they

¹ The JPI is a collaboration between national funding bodies, and it is not a European funding programme in its own right.

report it, and their willingness to respond to surveys of wellbeing, all of which may distort international comparisons.

b. Intergenerational relationships: how can welfare models distribute resources, rights and responsibilities in fair and sustainable ways?

Here we are seeking research which can inform policy on the impact of different approaches to welfare on the distribution of resources, rights and responsibilities between generations.

Demographic change is changing the balance between generations within the population, in different ways in different countries. The additional years spent in retirement due to declining mortality, and poor health in the final years of life, tend to shift resources from the young to the old. Sometimes political pressures strengthen or soften these trends. Other changes, in areas like housing markets, the labour market and the financing of education have intergenerational effects as well. Population ageing also changes the distribution of income and patterns of wealth accumulation.

These changes are not well understood, and there is little social consensus on the respective socio-economic roles and responsibilities of people at different life stages and how welfare models are adapting to the above mentioned changes in intergenerational relationships. We also need a better understanding on how older generations elaborate new strategies to ensure their own wellbeing in the light of their higher life expectancy (e.g. self-care initiatives) and how welfare models could possibly support these strategies. We also need a better understanding of how demographic changes (including for example geographical dispersal of families, the growth of single person households and multigenerational families, or extending working lives) may be changing the ability of the family to support its older members and affect the life situation and finances of individuals. The role of grandparents is also changing, with “young old” people sometimes trying to combine full time employment with caring for children, grandchildren and elders.

One potential area for exploration is the impact and scalability of the many projects, at national and European level, which have sought to promote better intergenerational relationships and mutual support. Another area would be projects that analyze the redistributive role of pension systems.

c. Welfare models: How can welfare models secure the health and wellbeing for older people confronted to caring needs, subject to frailty and nearing the end of life?

Here we are seeking research that can help our understanding throughout these phases of life (caring needs, frailty and end of life), and how welfare models can support health and wellbeing in these stages.

Although most of the older population is in relatively good health, as the population ages, caring needs for older people, especially for frail people and people in the last stages of their lives will have an increasing impact on welfare systems, and health expenditures are bound to rise. Welfare systems are already evolving in response, notably in seeking to move from the traditional single disease driven approach to a more proactive focus on holistic personal needs.

In the final years, and sometimes decades, of life most people require some form of social care (even if only a minority spends much time in formal residential care). Care may be provided by the state or the market, or by the family or community, and there are substantial national differences both in what is provided, at what level, and by what agencies or administrations. We are interested in understanding these differences and their effects, and in how care systems are changing, in response to growing demand and financial pressures on the state. One key aspect of this is the relationship between long-term care, health care systems and related areas of the welfare state, which are often managed, governed and financed separately. A further important concern is the capacity of the care “workforce” (paid and unpaid). Although caring for severely dependent older people is a demanding, stressful and skilled task, formal care is often carried out by low paid and minimally trained staff, with inadequate time allotments or skill for the task. At the same time, informal caregivers (including family members) often have no training, little support, and experience mental and physical stress, although many have physical limitations of their own. As the proportion of very old people rises, these problems can be expected to grow. One issue in need of research is therefore the development of the caring workforce – what models of recruitment, training and support are most effective and cost efficient, in the paid or unpaid economy.

Some forms of frailty may be reversible, and interventions can be designed and implemented to prevent or counteract health deterioration. Therefore, the development of techniques for the identification of those at risk, and for the management of particular conditions, could improve the sustainability of welfare models. However, to date there is a lack of studies and research programs evaluating the scale and impact of frailty on wellbeing and the sustainability of welfare models as the frail population grows.

A feature of extending life span is the rapid growth of the very old population. Although public policy sometimes appears to be attempting to defer mortality itself, we all die eventually, and the final years are often spent in far from ideal conditions. However, there has been little study of what constitutes wellbeing for those at this stage of life. The legal and social frameworks for the final years of life vary very greatly between countries, and in many cases are changing. We need a better collective understanding of quality of life in the final weeks or years, what constitutes a “good death” and how both can be ensured. There are evident ethical and legal issues to explore here.

III. APPLICATION

1. ELIGIBILITY

Proposals may be submitted by applicants belonging to one of the following categories (according to national eligibility criteria):

Public and private scientific, research, technological and innovation institutions; universities; research active industry; NGOs; and other institutions such as private companies, public institutions and other stakeholders involved in research activities, may participate in the project consortia as long as they are eligible for funding through national eligibility criteria.

Only transnational projects will be funded. Each proposal must involve **a minimum of three eligible applicants from at least three different countries participating in the call. The maximum number of eligible participants in a project consortium is seven.** The consortium should be reasonably balanced, not more than two eligible applicants per country/funding organization are allowed. Participants not eligible to be funded (e.g. from non-funding countries or not fundable according to national regulations of the participating funding countries) may participate in a project proposal if they are able to secure their own funding. Such participants should state in advance the source of funding for their part in the project. However, the majority of participant groups in a consortium and the Coordinator shall be eligible to be funded by the participating funding organisations, according to the national regulations (the list of National Contact Points is provided in Annex I).

The number of participants and their research contribution should be appropriate for the aims of the transnational research project. Each transnational collaborative project should represent the critical mass to achieve ambitious scientific goals and should clearly demonstrate an added value from working together.

Each consortium must nominate a **Coordinator** among the project's partners. The Coordinator must be considered an eligible project applicant by one of the funding organisations participating in the call. The Coordinator will represent the consortium externally towards the Joint Call Secretariat (JCS) and Call Steering Committee² (CSC), and will be responsible for its internal scientific management (such as controlling, reporting, intellectual property rights (IPR) and contact with the JCS). Each partner will be represented by one (and only one) Coordinator. Within a joint proposal, each Coordinator will be the contact person for the relevant national funding organisation.

Each applicant can submit up to two research proposals as partner or only one as Coordinator (e.g. the Coordinator of a proposal cannot be partner in another proposal). Please note that all the rules are subject to national regulations, therefore applicants are strongly encouraged to contact their national contact points to check their national eligibility rules before submission.

Whilst proposals will be submitted jointly by research groups from several countries, individual research groups will be funded by their national funding organisation. The applications are therefore subject to eligibility criteria of relevant national funding organisations of the respective country/region. It is highly recommended to read carefully the funding rules and eligibility criteria of the relevant funding organisation. **Applicants are strongly advised to contact their relevant funding organisation contact person before submitting an application; please note that for some countries it might be mandatory (see Annex I).**

Please note that if an applicant is found to be non-eligible by one of the funding organisations after the eligibility check, the entire proposal will be rejected without further review.

² Call Steering Committee: funding organisations' representatives.

The duration of the projects can be up to three years. Nevertheless, a partner can receive funding for less than 3 years according to funding organisations eligibility criteria and national regulations.

1.1 Financial and legal modalities

Eligible costs and funding provisions may vary according to the respective funding organisations' regulations. Each applicant is subject to the rules and regulations of their respective national funding organisation.

1.2 Submission of joint proposals

Joint proposals (in English), must be submitted to the online submission website no later than **11-04-2016 at 12:00 CET**. The server will not accept proposals after this time. Information on how to submit proposals electronically is available in "Guidelines for applicants" and "Proposal template" on the website.

For applicants from some countries it might be mandatory to submit the proposal and/or other information, in some cases before the deadline of this call, directly to the respective national funding organisation. Therefore, applicants are strongly advised to contact their funding organisations contact person (Annex I).

1.3 Further information

If you need additional information, please contact the JCS, or your national funding organisation contact person (Annex I).

2. EVALUATION PROCEDURE

The evaluation of the proposals will be organised as follows:

2.1 Formal check of proposals

The JCS will check all proposals to ensure that they meet the call's formal criteria (date of submission; number and category of participating countries; inclusion of all necessary information in English; appropriate limits on length). In parallel, the JCS will forward the proposals to the corresponding funding organisations which will perform a check for compliance to national rules. Proposals passing both checks (JCS and national) will be forwarded to the Peer Review Panel³ (PRP) members for evaluation. Proposals not meeting the formal criteria will be declined without further review. **Please note that if a proposal includes one non-eligible partner not able to secure their own funding, the whole proposal will be rejected.**

³ Peer Review Panel: international reviewers that will review the applications according to their expertise.

2.2 Peer-review of proposals

There are two steps in this reviewing procedure:

- **Remote evaluation:** each proposal will be allocated to three reviewers who fit the profile of the application. The first step of the peer review procedure will be a written evaluation. All reviewers will be asked for reports and scoring on the proposals according to specific evaluation criteria and a scoring system (see the evaluation procedure below).
 - **Rebuttal stage:** before the PRP members meet to discuss each proposal in the PRP meeting, each Coordinator is provided with the opportunity of studying the assessments and commenting on the arguments and evaluations of the reviewers, which remain anonymous. This stage allows applicants to comment on factual errors or misunderstandings that may have been committed by the reviewers while assessing their proposal and to reply to reviewers' questions. However, issues which are not related with reviewers' comments or questions cannot be addressed and the work plan cannot be modified at this stage. The applicants will have up to one week for this optional response to the reviewers' comments. Answers sent after the notified deadline, or not related with reviewers' comments or questions will be disregarded. After the rebuttal stage, PRP members will meet to discuss the proposals in the PRP meeting, which will allow them to establish a ranking list proposals selected for funding. This stage is managed by the JCS.
- **Peer review panel meeting:** The PRP members will have access to all the remote evaluations before the PRP meeting. At the PRP meeting reviewers should identify the proposals recommended for funding and not recommended for funding. Proposals recommended for funding will be ranked by the PRP according to the evaluation criteria.

The reviewers of the Peer Review Panel will perform the evaluation according to confidentiality rules and specific evaluation criteria (see below), using a common evaluation form. A scoring system from 1 to 5 will be used to evaluate the proposal's performance with respect to the six evaluation criteria. **Scoring system: 1: poor; 2: fair; 3: good; 4: very good; 5: excellent.**

Evaluation criteria:

- **Relevance:** clarity with the objectives and their respective relevance in relation to the aims of the call.
- **Scientific quality:** scientific excellence of the proposal in terms of innovative approach, originality and expected progress beyond the state of the art, availability and quality of existing data, comparative perspective and interdisciplinarity.
- **Quality of the project consortium:** international competitiveness of participants in the field(s), previous work and expertise of the participants, added value of the transnational collaboration, participation of junior researchers).
- **Feasibility of project plan:** relation of work packages to proposal themes and aims, quality of work plan and time schedule, balanced participation of project partners, quality and efficiency of the coordination and management, scientific justification and adequateness of the requested budget and risk assessment.

- **Potential impact on society and policy:** response to actual societal needs, providing evidence for policy makers and practitioners; early integration of relevant stakeholders, ensuring societal relevance over the course of the project and its dissemination).
- **Gender dimension:** a proposal is considered gender relevant when it can be expected that its findings affect women and men or groups of women and men differently. In these cases, applicants should integrate gender issues and, when relevant specific studies, as part of the proposals. Gender balance in applicants' consortia will be noted.

2.3 Final decision on funding

Based on the ranking list established by the PRP, the CSC will select the projects to be funded. Based on this list, final decisions will be made by national funding organisations and will be subject to budgetary considerations. The JCS will communicate to the Coordinator the final decision and send the evaluation report in due time.

2.4 Project start and Consortium Agreement

Projects selected for funding are expected to start during the first quarter of 2017. Consortium members must fix a common project start date, which would be the reference date for yearly and final monitoring reports and potential extensions. This common project start date must appear in the Consortium Agreement (CA).

It will be the responsibility of the Coordinator to draw up a CA suitable to their own group in order to manage the delivery of the project activities, finances, intellectual property rights (IPR) and to avoid disputes which might be detrimental to the completion of the project.

All consortium members must sign the CA and send it to the JCS. This CA will be made available upon request to the concerned funding organisations. **The project consortium is strongly encouraged to sign this CA before the official project start date**, and in any case the CA has to be signed no later than six months after the official project start date. Please note that national regulations may apply concerning the requirement for a CA (contact with the respective national contact point is advised). Further instructions will be provided by the JCS to the Coordinators of the projects selected for funding.

2.5 Confidentiality of the proposals

Proposals and any information relating to them shall be kept confidential within the reviewers and the CSC. Proposals shall not be used for any purpose other than the evaluation and subsequent monitoring of the funded projects.

Proposals will be required to include a publishable summary, which will clearly identify the main goals of the project. If a proposal is funded, this information will be published on the JPI MYBL website. All other project details shall be kept strictly confidential, although **national rules prevail**.

3. REPORTING REQUIREMENTS AND DISSEMINATION

Each Coordinator, on behalf of the project consortium, should submit to the JCS a brief annual progress report at the beginning of the second and third year project. In addition, it should be submitted a final scientific report of the transnational project (in English) no later than two months after the end of the project. These reports should state the scientific progress, the goals that have been met, and corrective measures set in case that the annual project plan has not been fulfilled. When applicable, each research group might have to report to its relevant funding organisation, in accordance with the respective national regulations.

In case of any significant changes in the work program or the consortium composition, the Coordinator must inform the JCS, who will inform the relevant funding organisations, who will decide upon the proper action to be taken.

All consortium members must ensure that all results (publications, etc.) of their research project's consortium activities include a proper acknowledgement that the projects were supported in part by the respective funding organisations under the framework of the JPI MYBL initiative. Moreover, Coordinators and/or Partners may be asked to present the results of their projects, at an intermediate and/or a final status seminar, during JPI MYBL events.

ANNEX I. FUNDING ORGANISATIONS CONTACT DETAILS

PARTICIPATING FUNDING ORGANISATION	COUNTRY	WEBSITE	CONTACT DETAILS
Federal Ministry of Science, Research and Economy (BMWFW)	Austria	http://www.bmwf.at/	Bettina Glaser Email: Bettina.Glaser@bmwf.at
Research Foundation Flanders (FWO)	Belgium (Flanders)	http://www.fwo.be/	Olivier Boehme Phone: +32 2 550 15 45 Toon Monbaliu Phone: +32 2 550 15 70 Email: jpi@fwo.be
Canadian Institutes of Health Research (CIHR)	Canada	http://www.cihr-irsc.gc.ca/	Melody Sajedi Phone: 613-960-9475 Email: Melody.Sajedi@cihr-irsc.gc.ca
The Academy of Finland, Research Council for Culture and Society Research Council for Health	Finland	http://www.aka.fi/	Tiina Forsman Phone: +358 29533013 Email: tiina.forsman@aka.fi
French National Research Agency (ANR)	France	http://www.agence-nationale-recherche.fr/	Teddy Arrif Phone: +33 (0)1 80 48 83 73 Email: teddy.arrif@anr.fr
The Israeli Ministry of Science Technology and Space (MOST)	Israel	www.most.gov.il	Dr. Hagit Schwimmer Phone: +972 (2) 54 11128 Email: hagits@most.gov.il
Ministry of Health (MOH-IT)	Italy	www.salute.gov.it	Dr. Gaetano Guglielmi Phone: (+39) 0659942186 Email: g.guglielmi@sanita.it
Ministry for Education, University and Research (MIUR)	Italy	http://www.istruzione.it/	Gaia Brenna Email: gaia.brenna@miur.it
The Research Council of Norway (RCN)	Norway	http://www.forskningsradet.no/	Lillian Margrethe Baltzrud Email: lmb@forskningsradet.no
Foundation for Science and Technology (FCT)	Portugal	http://www.fct.pt/	Ricardo Pereira Phone: [+351] 213 924 479 Email: ricardo.pereira@fct.pt
Ministry of Economy and Competitiveness (MINECO)	Spain	http://www.mineco.gob.es/	Dr. Jonas Radl / Leonor Gómez Phone: (+34) 916037269 Email: mybl@mineco.es
National Institute of Health Carlos III (ISCIII)	Spain	http://www.isciii.es/	Eduard Güell / Dori Campo Email: callmybl@isciii.es
The Netherlands Organisation for Health Research and Development (ZonMw)	The Netherlands	http://www.zonmw.nl/	Denice Moi Thuk Shung Phone: +31(0)70 349 5242 Email: moithukshung@zonmw.nl

ANNEX II. FUNDING ORGANISATIONS FUNDING COMMITMENT

PARTICIPATING FUNDING ORGANISATION	COUNTRY	TENTATIVE INITIAL FUNDING COMMITMENT (EUR)	ENVISAGED NUMBER OF PROJECTS POTENTIALLY FUNDED
Federal Ministry of Science, Research and Economy (BMWFW)	Austria	500 000€	2-3
Research Foundation Flanders (FWO)	Belgium (Flanders)	200 000€ To be distributed in shares of 30 k € max. per ongoing FWO project (i.e. top-up of 10 k € / year)	7
Canadian Institutes of Health Research (CIHR) and Social Sciences and Humanities Research Council (SSHRC)	Canada	1,056,450€ ⁴ (\$1,500,000 CAD)	5
The Academy of Finland, Research Council for Culture and Society Research Council for Health	Finland	1 500 000€ (from which 1 000 000€ is earmarked mainly for the topic C.)	3-5
The French National Research Agency (ANR)	France	800 000€	3-4
The Israeli Ministry of Science Technology and Space (MOST)	Israel	500 000€	5
Ministry of Health (MOH-IT)	Italy	800 000€	3-4
Ministry for Education, University and Research (MIUR)	Italy		
Foundation for Science and Technology (FCT)	Portugal	250 000€	1-2
The Research Council of Norway (RCN)	Norway	From 400 000€ to 800 000€	2-3 (pending role in projects)
Ministry of Economy and Competitiveness (MINECO)	Spain	300 000€	2-4
National Institute of Health Carlos III (ISCIII)	Spain	150 000€	1-2
The Netherlands Organisation for Health Research and Development (ZonMw)	The Netherlands	220 000€	

⁴ exchange rate used on December 2 from Bank of Canada 1Euro=0.7043

